Current Caseload Dashboard - OB

The purpose of this dashboard is to display data after the member has agreed to care management (CM) services through case closure. Therefore, the data within this dashboard focuses on those members with OB Episode Statuses of “Managed” and/or “Monitored.” See the Report Details Tab for more specific information and measure definitions.

This dashboard can be found using the following path:

OneLogin→CareImpact for OBCM and CC4C→Current Caseload Dashboard-OB

Key Concepts:

An **episode** is defined as the time spent in one of the active episode statuses (referred, pending, engaged, managed or monitored). The episode starts when the member is placed into an active OB Episode Status and the episode ends when the member is placed into one of the non-active OB Episode Statuses (graduated, declined, unable to reach, lost contact, deceased or ineligible). All members who had their active episode migrated into VirtualHealth from CMIS have an episode start date of October 25th.

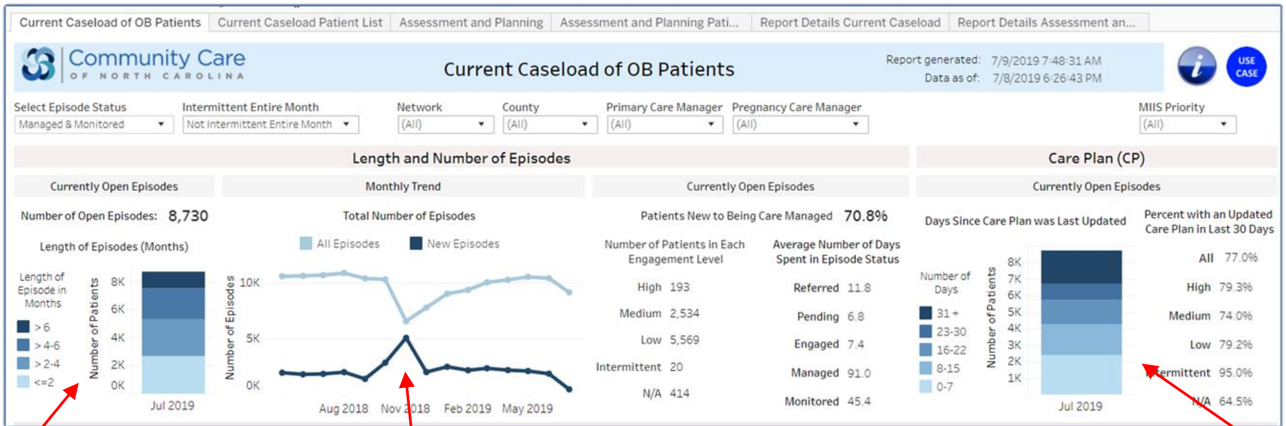
The **graphs are limited to those members in managed and/or monitored episode status**. The “Episode Status” selection box allows the user to select whether to display those members in managed, monitored or both. The historical trends and bar graphs require the member to have been in managed and/or monitored at least one day during the calendar month of interest. The current graphs and numbers require the member’s current episode status to be managed and/or monitored. Interaction Tracker data is captured for interactions when: 1.) the interaction is marked as “completed,” 2.) the interaction occurred within the calendar month of interest OR within 7 days prior to the OB Episode start date 3.) the interaction occurred within the active episode. For the care plan measures, the last 30 days are considered to determine if there is a signed care plan.

Use Case I: Current Caseload of OB Patients Tab

- Review the current number of open cases and create a patient list for those cases that have been open for more than 6 months.

1. Select the **Current Caseload of OB Patients** tab

2. The **Currently Open Episodes** view will show the total number of open cases for all members that the user has permission to view. The graphs display the past 15 months of data. (*Note: Historic CMIS data is included within the Current Caseload Tab but not within the Assessment & Planning Tab.)*

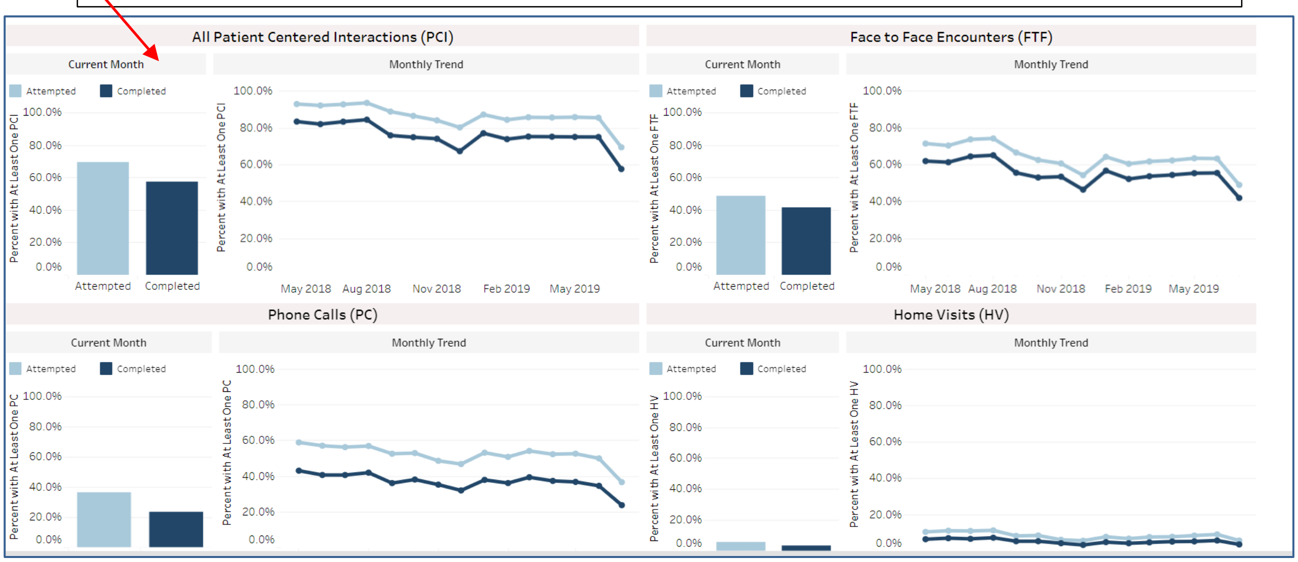


The bar graph displays the total number of members currently in an active managed and or monitored episode status, and how many months the OB Episode has been open.

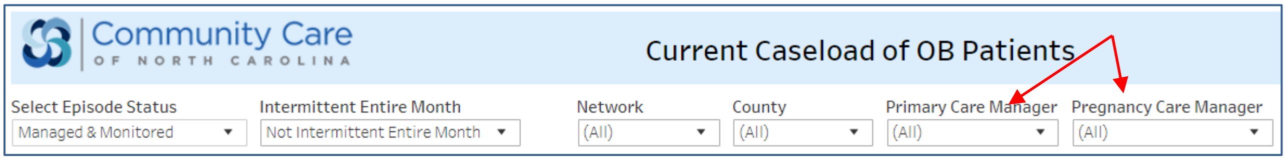
The line graph displays the total number of episodes within that month. The "All Cases" line displays a combination of newly opened Episodes and Episodes which were open for at least one day within the month. The line for "Newly Opened" Episodes represents only newly opened Episodes within the month.

This stacked bar graph displays how many days it has been since the care plan was last updated for all members currently in an active managed and/or monitored, non-intermittent OB Episode Status.

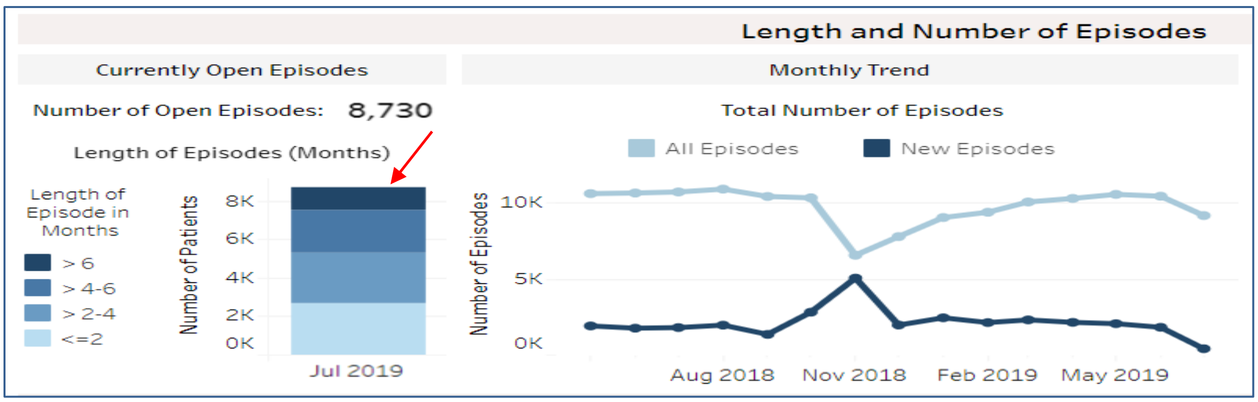
All Patient Centered Interactions are defined as an interaction completed or attempted with the patient including a Face to Face, Phone Call or visit (community, home, practice). The attempted interaction bar includes both attempted and completed interactions. The completed interaction bar only includes completed interactions. The denominator for all four measures is members who were in an active Managed and/or Monitored, non-intermittent status for at least one day within the reporting month.

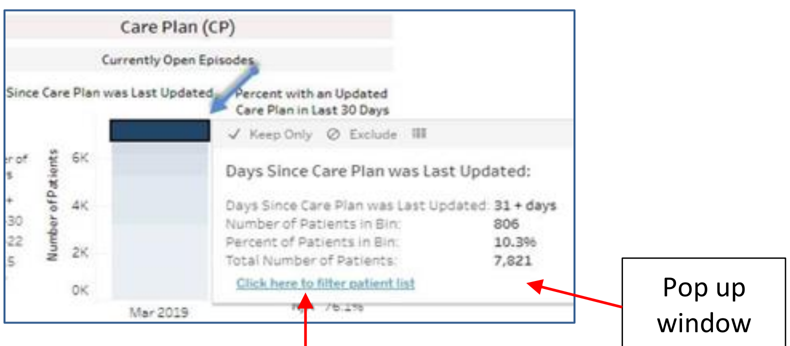


3. Set the **Pregnancy Care Manager and/or Primary Care Manager** filter to limit the data to one or more specific care managers. *(Primary Care Managers are identified as lead (quarterback) specially identified on the member's care team. This CM can be from any of the care management programs, including Complex.)*

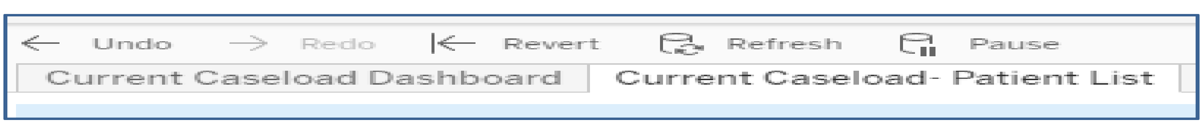


4. To focus on members with cases that have been open for 6 or more months or members whose care plan was last updated greater than 31 days, select the dark blue section of the bar graph. A pop-up window will appear.

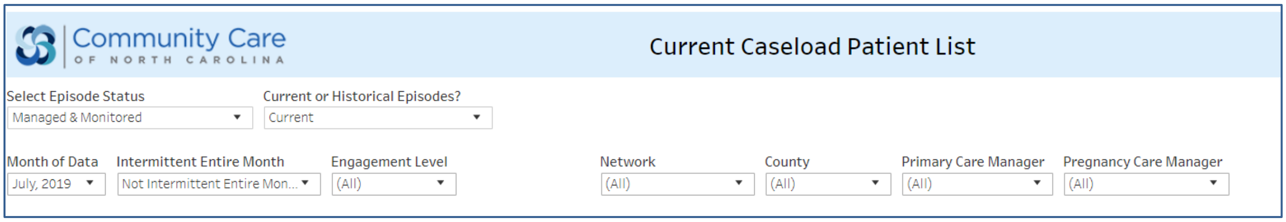




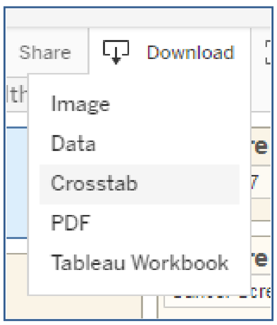
5. Select **Click here to filter patient list** to create the patient list. The dashboard will now show the list on the Current Caseload – Patient List tab



6. Use the filters at the top and right of the page to further filter the data



7. Use the **Download – Crosstab** menu option to download the patient list to Excel. (If the Crosstab option is grayed out, click somewhere in the column headers of the patient list to tell Tableau what you want to download and then go back to the Download menu. It should look like the one shown here.)

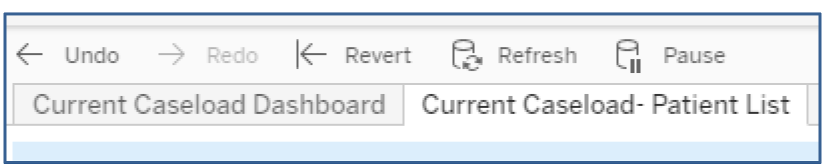


8. Select **Download** from the dialog box that appears (shown above). The patient list can then be opened in Excel and further sorted and edited as needed.

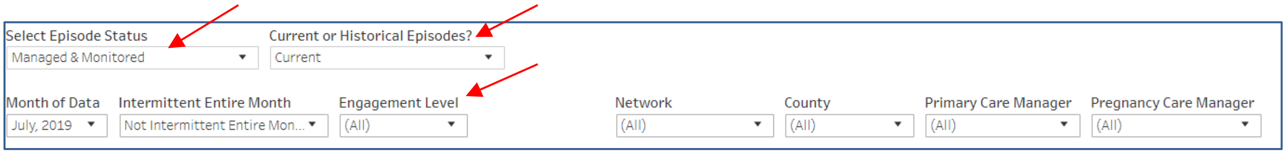
Use Case II: Current Caseload Patient List Tab

The **Current Caseload Patient List** tab reflects data from the Current Caseload of OB Patients Tab. It retains the population selected within that tab. Users may use this tab to provide details of the population and identify gaps in current and historical episodes.

1. Select the **Current Caseload Patient List** tab

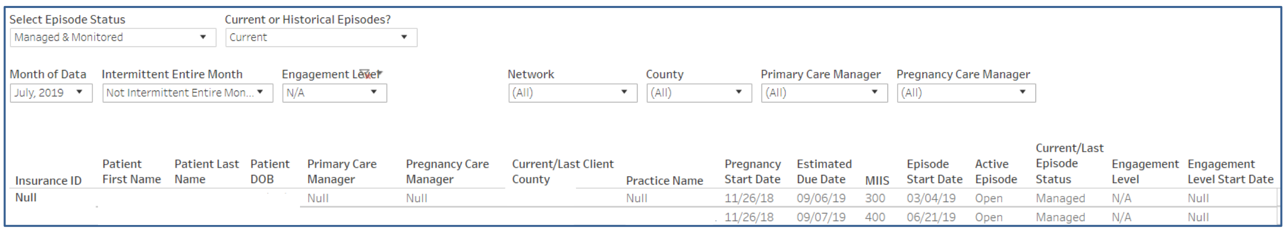


2. Use the filters at the top of the tab to select the appropriate settings such as "Managed & Monitored" Episode status, "Current" episode and an "N/A" Engagement Level.



3. The patient list appears below the filters. Review records with the identified gaps. "Null" indicates that item is missing within the record.

   (In the example below, the first chart does not have a Primary or Pregnancy Care Manager or Practice Name documented. The record is also in an active OB Episode Status; however, an Engagement Level is not set. Identifying information has been removed from the example.)


Select Episode Status: Managed & Monitored
Current or Historical Episodes?: Current
Month of Data: July, 2019
Intermittent Entire Month: Not Intermittent Entire Mon...
Engagement Level: N/A
Network: (All)
County: (All)
Primary Care Manager: (All)
Pregnancy Care Manager: (All)

Insurance ID	Patient First Name	Patient Last Name	Patient DOB	Primary Care Manager	Pregnancy Care Manager	Current/Last Client County	Practice Name	Pregnancy Start Date	Estimated Due Date	MIIS	Episode Start Date	Active Episode	Current/Last Episode Status	Engagement Level	Engagement Level Start Date
Null				Null	Null		Null	11/26/18	09/06/19	300	03/04/19	Open	Managed	N/A	Null
								11/26/18	09/07/19	400	06/21/19	Open	Managed	N/A	Null

The easiest way to utilize this report is to download it to an Excel document, and then review the columns from the left to the right. Key Quality Improvement considerations include reviewing:

- Any member missing an assigned Pregnancy Care Manager and/or Primary Care Manager.
- Any member missing an Estimated Due Date (EDC). This column can be viewed oldest to newest EDCs, and then use the list to clean up caseloads that are still showing members on a caseload well beyond their two months postpartum period.
- The member's MIIS.
- The Engagement Level. Note those that have an Engagement Level of "Null" or "Low." The Engagement Level should reflect the frequency and intensity of services provided.
- The date indicated on the last "Patient Centered Interaction Date Most Recently Completed" column. To prioritize members in need of a patient centered interaction, this column can be sorted from oldest to newest. Similarly, review the "Patient Centered Interaction Days Since Last Completed" column, and sort it from largest to smallest to prioritize members that need a patient centered interaction.
- The date indicated on the last "Face to Face Date Most Recently Completed" column. To prioritize members that need a face-to-face encounter, this column can be sorted from oldest to newest. Similarly, review the "Face to Face Encounter Days Since Last Completed" column, and sort it from largest to smallest to prioritize patients that need a face-to-face encounter.
- The date indicated on the "Care Plan Most Recent Update Date" column and the number of days since the care plan was updated in "Care Plan Days Since Last Completed (or Since Episode Started)" column. Care Plans that have not been updated in 30 or more days warrant further review.

- ➢ The date indicated on the “Comprehensive Needs Assessment Date Last Completed” column and the number of days since the Comprehensive Needs Assessment was updated “Comprehensive Needs Assessment Days Since Last Completed (or Since Episode Started).” The CNA-OB should be updated as part of every interaction with the patient or at least every 30 days and during the postpartum period.

- ➢ The number of “Days in Referred Status” column. This column can be sorted from highest to lowest to identify care management patterns and to determine the cause for a delay in engagement of the member. A blank in this column indicates that the time spent in this status was less than one day.

- ➢ The number of “Days in Pending Status” column. Members should not have many days in “Pending” status, as this reflects how long it takes from the date the OB Episode was created until a care manager is assigned. This column can be sorted from from highest to lowest to identify care management patterns and to determine a cause in delay for assigning the care manager. A blank in this column indicates that the time spent in this status was less than one day.

- ➢ The number of “Days in Engaged Status” column. A patient in an “Engaged” OB Episode Status indicates the member accepted care management as documented in the Interaction Tracker; however, the assessment and care plan have not been completed. This column can be sorted from highest to lowest to identify care management patterns in documentation and engagement flow. A blank in this column indicates that the time spent in this status was less than one day.

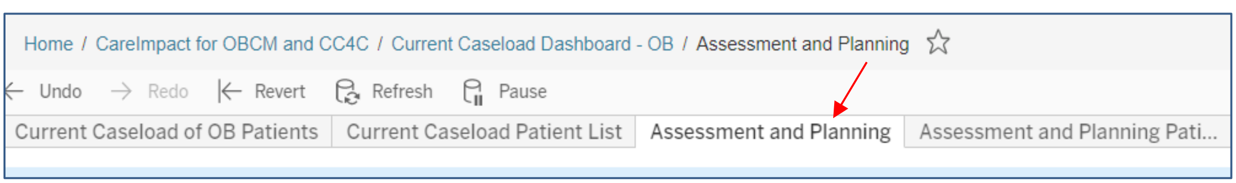
Use Case III: Assessment & Planning Tab

The **Current Caseload Assessment and Planning Tab** displays the key standards of Pregnancy Care Management: Comprehensive Needs Assessment (CNA), Care Plan (CP), Interactions for Engagement Levels and Face to Face Encounters (FTF).

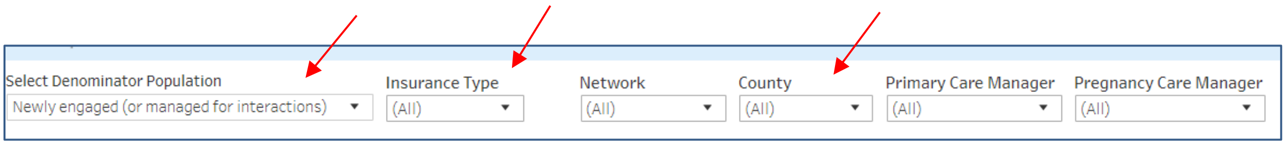
This dashboard presents data after the member’s episode status changes to “Engaged” plus 30 days. As a reminder, the dashboard tab requires a 30-day run; therefore, the last two months of data are incomplete.

- ➢ Review member records who are “Newly engaged (or managed)” and the episode lasted longer than 60 days.

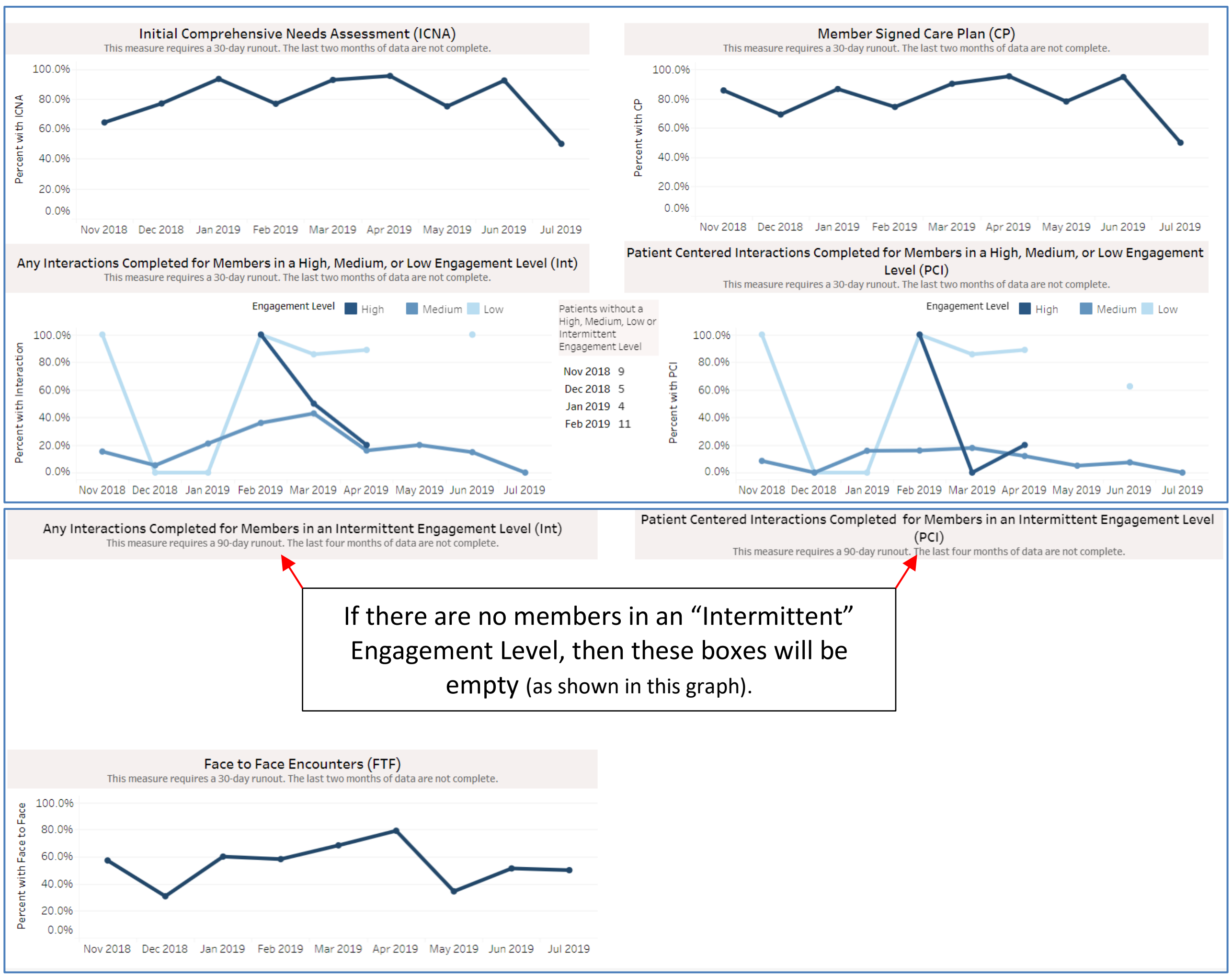
1. Select the **Assessment and Planning Dashboard** tab



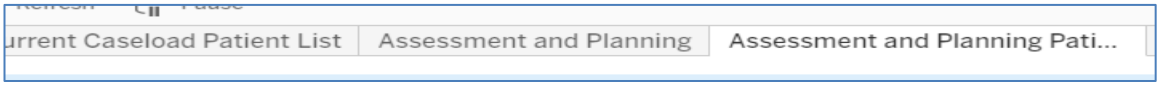
2. Use the filters at the top of the tab to select the appropriate settings: “Newly engaged (or managed for interactions) episode lasted 60+ days past engaged” as the Denominator Population, “All” for the Insurance Type (unless reviewing non-Medicaid members) and the desired county. On the far right of the screen, there is another filter for MIIS. This can further be filtered for “All,” “Priority” and “Non-Priority” MIIS members.



3. The graph will display below the filters



4. To view the associated patient list, select the **Assessment and Planning Patient List** tab.



The top portion of the screen displays **Historical Reporting Months,** while the bottom portion displays **Current Opportunities**. The “X” on the Current Opportunities table indicates items which are still needed.

Assessment and Planning Patient List- Historical Reporting Months

This list includes everyone with a new engaged or managed episode status within the month of interest.

This list offers all months of data past VH go-live. All measures require 30, 60 or 90 days of runout so numbers and dates could change.

Patient First Name	Patient Last Name	Primary Care Manager	Pregnancy Care Manager	Episode Start Date	Engaged Status Start Date	Managed Status Start Date	First Managed Status Start Date (Used as the enga..	Assessment Planning Engagement Level	Assessment Planning Engagement Level Start Date	Assessment Planning Days Past Engaged	Assessment Planning CP Date	Assessment Planning CNA Date	Assessment Planning Face to Face Interactions Count	Assessment Planning Patient Centered Interactions Count	Assessment Planning Interactions Count
Null				06/07/19	07/08/19	07/08/19	Null	Medium	06/13/19	0	07/08/19	07/08/19	1	1	1
Null,				07/02/19	07/08/19	Null	Null	Null	Null	0	Null	Null	Null	Null	Null
				06/03/19	07/02/19	Null	Null	Null	Null	6	Null	Null	Null	Null	Null
[illegible]	[illegible]	[illegible]	[illegible]	04/26/19	07/03/19	07/03/19	Null	Medium	07/03/19	5	07/03/19	07/03/19	1	1	1

Assessment and Planning- Current Opportunities

(✗ means member still needs assessment/interaction)

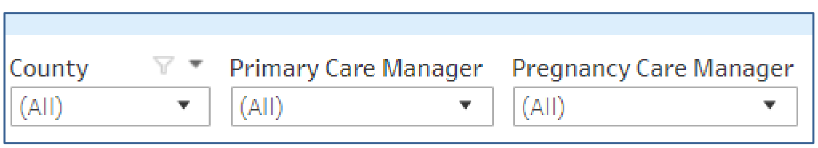
Insurance ID	Patient First Name	Patient Last Name	Engaged Status Start Date	Managed Status Start Date	First Managed Status Start Date (Used as the engaged status start date if patient skipped engaged)	Assessment Planning Engagement Level	Assessment Planning Engagement Level Start Date	Days Left for CP, FTF and ICNA (30 days past engaged)	Days Left for Interactions for Members in High, Medium, and Low (30 days past managed)	Days Left for Interactions for Members in Intermittent (90 days past managed)	Needs Initial Comprehensive Needs Assessment	Needs Care Plan Signed	Needs Face to Face Encounter	Needs Patient Centered Interactions	Needs Interactions
				06/12/19	Null	Medium	06/12/19	4	4	Null				✗	✗
				06/13/19	Null	Medium	06/13/19	5	5	Null			✗	✗	✗
				06/13/19	Null	Medium	06/13/19	5	5	Null			✗	✗	✗
				06/14/19	Null	Medium	06/14/19	6	6	Null				✗	✗
				06/15/19	Null	Low	06/15/19	7	7	Null			✗	✗	

Use Case IV: Assessment and Planning Tab

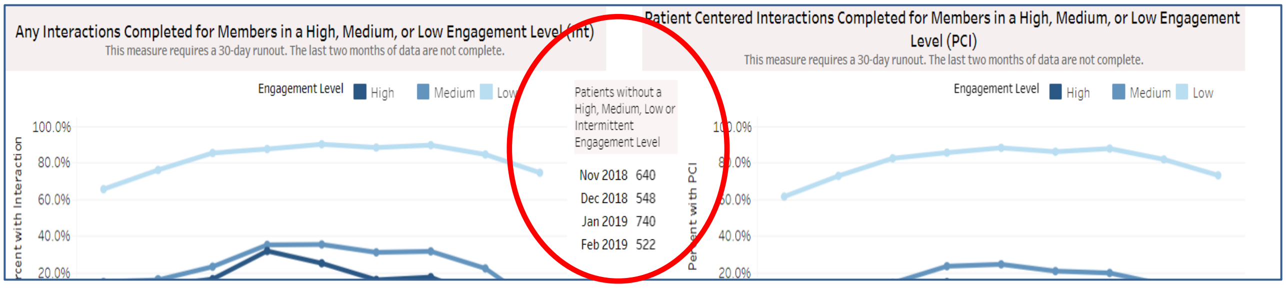
➢ Identifying Managed members that have NOT been assigned an Engagement Level

1. Select the **Assessment and Planning** tab

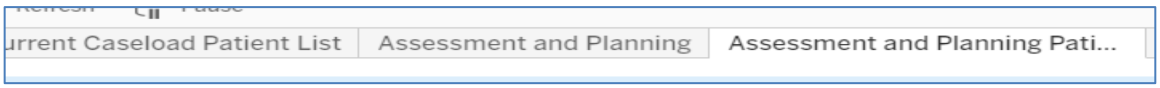
2. User may drill down by County, Primary Care Manager or Pregnancy Care Manager



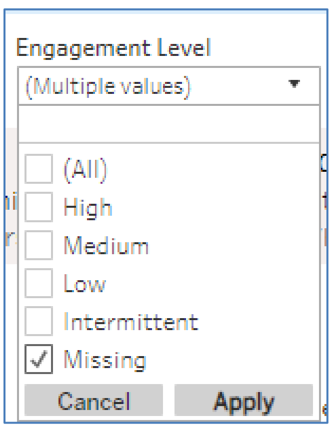
3. Scroll down to Interactions graphs and note number of members without an Engagement Level



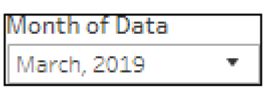
4. Select **Assessment and Planning Patient List** tab



5. Select “Missing” from Engagement Level and “Apply.”



6. Select “Month of Data.”



7. Select Download-Crosstab menu options to download the patient list to an Excel document. The patient list can be further sorted and edited once in an Excel spreadsheet.

8. In the Excel spreadsheet, filter “Managed Status Start Date” columns to include all dates _except_ “Blank.” This will provide a list of members that are being managed but do NOT have an Engagement Level set.